

Central Procurement Office



Agency Sourcing in Edison

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Creating New Sourcing Events

Introduction:

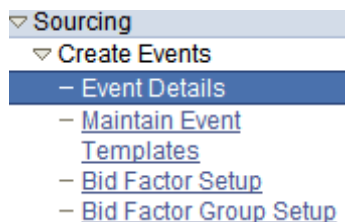
A **Sourcing Event** in Edison is a method for obtaining competitive bids and documenting information about purchases. An Event consists of:

- Basic information about what is being bought, in the "Event Name" and "Event Description" sections
- Line Item information, listing in detail what exactly is being bought. This includes Edison Item ID (if any), Item Description, Unit of Measure, NIGP Code, price and Quantity. The Line information will be copied over from the Requisition, and will also include Chart field information that is not directly visible on the Event.
- Notes and supplemental information, including Terms & Conditions, Specifications, and any descriptive attachments
- Bid Factors, which are questions that the prospective Bidder must answer that are not specifically part of bidding on a line
- Bidder information, determining who will be sent information about the Event
- Bids can be entered directly into the system via an online interface by registered Bidders, or hard-copy Bids can be entered On Behalf Of by agency personnel
- After the Bids have been recorded, the Sourcing Event is awarded to a Purchase Order.

Process: *How to Create a New Sourcing Event*

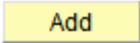
Creating a new Sourcing Event begins with the Create Events page, located in the Sourcing module.

1. Select Sourcing from the main menu. Then click Create Events. From there, click the Event Details link on the left-hand side of the page.



2. Clicking Event Details will bring up the **Create Events page**, shown below. The Business Unit will default in based on User Preferences. Make sure this is the correct Business Unit, meaning the same as the one on the Requisition. Leave the Event ID as NEXT, so it auto-assigns a new Event ID Number.

3. Select the Event Format and Event Type from the two drop-down menus. Select the **Buy** Event Format. Leave the Event Type as **RFx**. Examples are shown below.

4. Click the Add button (). This will bring you to the **Create an Event: Event Summary** page.

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)

[Event Constraints](#)

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

Event Name and Description

The first step on the Event Summary page is to create an Event Name and Event Description. These will be included on any solicitations sent to the vendor, so they must be clear and descriptive.

- **Event Name:** This will be the subject line of any e-mailed Solicitation sent to Bidders. To create an Event Name, click in the Event Name field and type in the name. The first 18 characters of this are what will be displayed on the Event Workbench. This must include a description of the product, the job or the main function of the contract being requested.

*Event Name:

Event Description: This forms the body of any e-mailed Solicitation sent to Bidders. This will be the first thing the vendor sees on the event, and will need to be sufficient for them to know if they will want to bid.

- To create an Event Description, click in the Event Description field and type in the Description. This will need to fully describe the Event in enough detail so that any Bidder will know what they are being asked to bid on. Specifications are not to be included here. Examples are provided :

Description:
Pre Bid Date: 12/18/2009 9:00 AM CST

Copying Lines from a Requisition into a Sourcing Event

1. On the Event Overview page locate the “Copy From” drop-down box; select the Requisition option, as shown below. Then click the Go button.

Copy From:
ive your event led.

- Contract
- Item Master
- Planning Order
- Purchase Order
- Request For Information
- Requisition**

Go

2. Clicking the Go button will bring up the screen shown below. Make sure that the **Copy From** drop-down box has Requisition selected.

Create an Event

Enter Copy Criteria

Copy Template

Copy From: Requisition

Select Criteria

Business Unit:

*Copy Method: Append

*Select Lines: Append

Copy Criteria

Req ID: Buyer: Vendor SetID: Vendor ID: SetID: Item ID: Category: ☐ Exclude Auto Source Item☐ Stockless Item☐ Copy all Req/RFQ lines☐ Include Inventory Items☐ Include Reqs With No Vendor

- In the **Select Criteria** section, select the appropriate Business Unit either by using the Lookup tool (🔍) or typing it directly into the window, as shown below. It does not default.

Select Criteria

Business Unit: 32101 🔍

- Select Copy Method: Append or Override from the Copy Method drop-down. A picture of the drop-down menu is shown below. The Copy Method is used to determine what is done with the copied information. **Append** adds the information to the end of any existing line information, while **Override** saves over the existing line information, completely replacing it. *For a One-Time Purchase, choose Append when first copying.*

*Copy Method: Append

*Select Lines: Append

- Next, choose the Req Lines option from the Select Lines drop-down menu. This tells the system that you want to pull information from the Requisition Lines.

*Copy Method: Append

*Select Lines: Req Lines

- In the **Copy Criteria** section, you must select the Requisition ID (number) to be copied.
 - Type the Requisition ID # in the Req ID field, as shown in the example.

Copy Criteria

Req ID:

Buyer:

SetID:

Category:

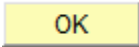
Vendor SetID: Vendor ID:

Item ID:

☐ Exclude Auto Source Item ☐ Stockless Item ☐ Copy all Req/RFQ lines

☐ Include Inventory Items ☐ Include Reqs With No Vendor

OK Cancel Refresh

- Click the OK button  to proceed.

- After pressing OK, it will bring up a list of the lines that were on the Requisition selected. This is where you confirm the Requisition lines that will be copied over to the Event. See the picture below for an example.

Requisition Lines to Copy

☒ [Select All](#) ☐ [Deselect All](#)

Select Lines										Custom
Sel	Item	SetID	Item	Description	Quantity	UOM	Price	Currency	Due Date	Business Unit
<input type="checkbox"/>	SHARE			Widget	6.0000	EA	500.00000	USD		32101

- The Select All link (☒ [Select All](#)) can be used to include all the lines with one click. When pressed, it will place a checkbox (☒) next to all of the lines, indicating that they will be copied. If only certain lines are needed, individual lines can be selected by checking the check box beside them.
- Further information on the lines can be found by using the scrollbar at the bottom of the screen to scroll to the right. After all desired lines are selected; click the OK button, located below the lines.

OK Cancel Refresh

- Clicking the OK button will bring you to the **Create an Event: Line Items** page. This allows review of the Lines copied over in the previous steps. An example of this page is shown below.

Create an Event

Line Items

Business Unit: 32101 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:

Line Items							
Basic Definition		Advanced Definition					
Line Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	Vehicles	060-09	EA	156.0000	100.0000	\$15600.00	0.00000

Event Total: 15600.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

11. After reviewing the lines, click the Save Event Changes button () at the bottom of the page.
12. After saving, click the Return to Event Overview link. [< Return to Event Overview](#)
- ❖ When the Event is saved for the first time using the Save Event Changes button, an Event ID number will be assigned by the system. This will be shown at the top of the **Event Summary** page.

Event Summary

Business Unit: 32101 Event ID: 0000000283

The Event Number cannot be assigned unless the Event has:

- An Event Name and Event Description
- At least 1 Line (copied from the Requisition)

13. The next step in the Event process is to assign option preferences. This is done on the **Event Summary** page, in **Step 1 Define Event Basics**.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)

[Payment Terms and Contact Info](#)

[Event Comments and Attachments](#)

[Event Constraints](#)

[Event Header Bid Factors](#)

Begin with Event **Settings and Options**.

Event Settings and Options:

- Click the **Event Settings and Options** link ([* Event Settings and Options](#)). The list of option checkboxes is shown in the picture below with the recommended options selected, with bulleted descriptions starting underneath the picture.

Event Settings and Options

Business Unit: 32101 Event ID: 0000000030 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

<input checked="" type="checkbox"/> Allow Bidder XML Downloads <input checked="" type="checkbox"/> Bid Required On All Lines <input checked="" type="checkbox"/> Multiple Bids Allowed <input checked="" type="checkbox"/> Allow Edit of Posted Bids	Round/Version Display: <input type="text" value="Display Round and Version"/> <input checked="" type="checkbox"/> Sealed Event <input type="checkbox"/> Display Bid Factor Weightings
Factor Event Score Into: <input type="text" value="Total Score"/> Header Weighting: <input type="text"/>	Start Price: <input type="text" value="Do Not Display"/>

- **Allow Bidder XML Downloads** is checked by default. When checked, it allows the Bidder to download the Solicitation and open it as an Excel form and fill it out electronically. **Leave this checked.**
- **Bid Required on All Lines** is checked by default. When checked, it requires the Bidder to submit a bid for all lines. When unchecked, it allows the Bidder to only bid on the lines they choose. **Leave this checked unless you want to do Line Item Awards.**
- **Multiple Bids Allowed** is *not* checked by default. When checked, this allows the same Bidder to enter multiple bids. When unchecked, the Bidder can only enter one bid. **Check this box.**
- **Allow Edit of Posted Bids** is checked by default. When checked, this allows the Bidder to edit their bids that they have already posted. **Leave this checked.**
- **Sealed Event** is checked by default. When checked, Bidders will not be able to see Bids that have been posted other than their own. **Leave this checked.**
- **Display Bid Factor Weightings** is checked by default. When checked, this enables the Bidders to see how much weight is given to each question asked of them. **Uncheck this box.**
- **The last three options (Factor Event Score into Total Score, Start Price and Header Weighting) are not used at this time.**

After selecting the desired options, choose the **Return to Event Overview** link.

[< Return to Event Overview](#) This will return you to **Step 1: Define Event Basics**.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)
[Event Constraints](#)

- Click the **Event Comments and Attachments** link. You will be taken to the **Event Header Comments and Attachments** page, as shown below.

Event Header Comments and Attachments

Event ID: 0000000242

Enter Comments First ◀ 1 of 1 ▶ Last

Comments: + -

☐ Send To Bidder
 ☐ Include On Award
 [Standard Comments](#)

Add Attachment

OK Cancel Refresh

Event Header Comments and Attachments

This section is used to attach supporting documents and text to the Sourcing Event. It can also be used to record internal notes.

Items in this Header section are applicable to every line on the Event. They will include:

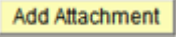
- Specifications not specific to a line, as an Attachment
- Any documentation pertinent to the Event.

Note: The comment section is limited. Having a comment that is too lengthy can cause the event to fail.

For all Comments: Leave the box “Send to Bidder” box un-checked if you’re entering a general comment.

Adding Documents as Attachments

Go to the Header Comments and Attachments section.

- Documents may need to be attached using the Add Attachment button. .
- To add documents, click the Add Attachment button. This will bring up the screen shown in the example below. Click the browse button to locate the file to attach, and then click the Upload button.

C:\Documents and Settings\BA10315\Desktop\WLAN E\ [Browse...](#)

[Upload](#) [Cancel](#)

3. After clicking Upload, you will be returned to the **Event Header Comments and Attachments** page. The attachment will be shown at the bottom, like in the picture below. **Make sure the “Display to Bidder” and “Include on Award” boxes are checked** for both the Comments box and all Attachments if you want that certain attachment displayed. Check **“Include in Notifications”** if you want that document to be included in the event notification emails to the bidders/vendors. If you just want an attachment there for audit purposes; such as comptroller approval, etc don’t check these boxes.

Event Header Comments and Attachments

Event ID: NEXT

Enter Comments First ◀ 1 of 1 ▶ Last

Comments: + -

☐ Send To Bidder ☐ Include On Award [Standard Comments](#)

[Add Attachment](#)

					First ◀ 1-2 of 2 ▶ Last
Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
1 Terms_and_Conditions_32101-00144.doc	<input type="text"/>	✓	✓	✓	🔍 -
2 Specifications_Event_32101-00144.doc	<input type="text"/>	✓	✓	✓	🔍 -

[OK](#) [Cancel](#) [Refresh](#)

4. Once all Attachments are added, click the OK button. This returns to the Event Overview page, **Step 1: Define Event Basics**, as shown below.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)

[Event Constraints](#)

Bid Factors:

After adding all of your Attachments if there is additional information that must be obtained from the Bidder, **Bid Factors** are set up on the Event to allow you to ask questions that the Bidder can respond to.

- Within the Event, there are two places where Bid Factors can be added; at the Header level and at the Line level.
- Bid Factors at the **Header** level apply to the Event as a whole, regardless of how many lines there are. An example of a Header level Bid factor would be “Will you be using a subcontractor?”
- Bid Factors at the **Line** level apply only to the individual line. An example of a Line level Bid factor would be the Brand and Model being bid.

There are two ways to use Bid Factors, either by creating new ones or using saved ones. Most Bid Factors will already be saved in the system, but in special circumstances it may be necessary to create new ones.








The next step is to look through the pre-existing Bid Factors and determine which of them you must include on your Event.

In **Step 1: Define Event Basics**; click the **Event Header Bid Factors** link. You will be taken to the **Event Bid Factors** page.


Modify an Event

Event Bid Factors

Event ID:	0000000242	Bid Factor Weighting Total:	
Event Name:	SW 121- SHREDDING SERVICE, ON-SITE, PAPER & MEDIA	Remaining Bid Factor Weight:	100.00000

Bid Factors			
Seq Nbr:	1	'Bid Factor:	<input type="text"/> 
		'Type:	<input type="text"/>
		Weighting:	<input type="text" value="0.00000"/>  
Question:	<input type="text"/>		<input checked="" type="checkbox"/> Display Bid Factor? <input checked="" type="checkbox"/> Bid Factor Response Required <input type="checkbox"/> Ideal Response Required <input type="checkbox"/> Include on Contract
Best:	<input type="text" value="0.000000"/>	Worst:	<input type="text" value="0.000000"/>
		UOM:	<input type="text"/> 
<input type="checkbox"/> Select for deletion			
Add Bid Factors by Group		Select Bid Factors	
		   Delete Selected Rows	

Bid Factor Weighting Total:		Remaining Bid Factor Weight:	100.00000
------------------------------------	--	-------------------------------------	-----------

A new Bid Factor will have no data entered. To choose from the list of existing Bid Factors, click the Lookup Icon () next to the Bid Factor field.

Seq Nbr: 2 *Bid Factor: *Type: Weighting:

Question:

Best: Worst: UOM:

☐ Select for deletion

☒ Display Bid Factor
☒ Bid Factor Response Required
☐ Ideal Response Required
☐ Include on Contract

1. This brings up the list of Bid Factors. The search fields work the same as on any other page. Scroll down past the Search fields to see the list of currently-available Bid Factors.

Look Up Bid Factor

Search by: begins with

[Advanced Lookup](#)

Search Results

View All First 1-25 of 25 Last

Bid Factor Code	Bid Factor Type	Description
BRAND_MODEL	Text	Brand and Model
CATALOG	Yes/No	Electronic Catalog
CREDIT_SCORE	Numeric	Credit Score
DELIVERY	Numeric	Delivery Time
DELIVERY_AREA	List	Delivery Area

2. Click on the blue link for the Bid Factor needed. This will return you to the Bid Factor screen with the Bid Factor information populated into the field.

Search Results

View All First 1-25 of 25 Last

Bid Factor Code	Bid Factor Type	Description
BID_OFFER_EXPIRE	Numeric	Bid Offer Expiration
DGS_ATM_TERM	Text	Service Organization, T505
DGS_BIDDER_COOP	Yes/No	Local Government Offer T500
DGS_INVENTORY	Text	Inventory, T525
DGS_INV_TIME_IN_BU	Text	Inventory, Time in Business,
DGS_LICENSES	Text	Licenses (Listings), T560
DGS_QUAL_CONTROL	Text	Quality Control, T522
DGS_RETURN_GOODS_P	Text	Return Goods Policy, T550
DGS_SEC_STATE	Text	Register with Secretary of Sta
DGS_SRVC_EXPERIEN	Text	Janitorial Service Experience,

Seq Nbr: 2 *Bid Factor: Type: Numeric Weighting:

Question:

Please enter the number of days that your bid offer will expire from the bid opening date:

Best: Worst: UOM:

☒ Display Bid Factor

☒ Bid Factor Response Required

☐ Ideal Response Required

☐ Include on Contract

Cost Contribution

- To add additional Bid Factors, press the plus button () to create a new blank Bid Factor below the previous one entered. Repeat the process above, filling in a Bid Factor and adding a new one, for every necessary Bid Factor. Then scroll down to the bottom of the page and press the Save Event Changes button.

☐ Select for deletion

[Add Bid Factors by Group](#) [Select Bid Factors](#)

Bid Factor Weighting Total: Remaining Bid Factor Weight: 100.00000

GoTo:

Adding Ad Hoc Event Header Bid Factors

- If you are creating an entirely new Bid Factor (Ad Hoc Bid Factor), click on the Type drop-down box. This allows selecting of the Bid Factor Type, which will determine the format the Bidder must use to answer the question. The types include:

*Type:

List

Monetary

Numeric

Separator

Text

Yes/No

- Date (for example, Contract Start Date)
- List (to include a List of references, for example)
- Monetary (Amounts of money, as in a price)
- Numeric (Numbers, such as Quantity)
- Separator (Mainly used to organize the Solicitation)
- Text (A free-form field to type any text response)

g. Yes/No (To limit the Bidder to a Yes or No answer.)

- ❖ An example of an Ad Hoc Bid Factor is shown below. It was created by selecting Yes/No from the type field, then typing text into the **Question** field.

Bid Factors

Seq Nbr: 1 'Bid Factor: *Type: Yes/No Weighting: 0.00000

Question: Will you be able to provide services by the estimated start date of the contract, 1/1/09?

Yes/No
☒ Yes ☐ No

☒ Display Bid Factor?
☒ Bid Factor Response Required
☒ Ideal Response Required
☐ Include on Contract

► Cost Contribution

- A list of checkboxes is shown on the main page to allow more fine-tuned configuring of the Bid Factor selected.
 - **Display Bid Factor** is checked by default. When checked, this shows the Bid Factor on the Solicitation. **This should be checked.**
 - **Bid Factor Response Required** is checked by default. This means that the bidder must answer this question in order to submit a bid electronically. If this box is unchecked, the Bidder will be able to submit a Bid without answering the question.
 - **Ideal Response Required** is unchecked by default. When combined with the Ideal Response field, this allows a question to be set up to where if the Bidder does not answer with the “right” answer, they will not be able to complete the bid.
 - **Include on Contract** is unchecked by default. When checked, it includes the question and the winning Bidder’s answer on the Contract.

After Adding all Bid Factors:

Once all Bid Factors are added, you must review them to make sure that **NONE** of them have the "Ideal Response Required" box checked. ☐ Ideal Response Required

IF THIS BOX IS CHECKED, BIDDERS MAY NOT BE ABLE TO COMPLETE THEIR BIDS!

After you have verified that none of the Bid Factors have the Ideal Response Required box checked, click the Return to Event Overview link. This returns to the Event Overview page, **Step 1: Define Event Basics**, as shown below.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)

[Event Constraints](#)

In Step 1: Define Event Basics; the only thing left to do is add the Phone Number for the Buyer, in Payment Terms and Contact Info.

Payment Terms and Contact Info

The Buyer's phone number **must** be added in this section. Click in the Phone field, type in the Buyer's Phone number, then press the Save Event Changes button. Then click on the Return to Event Overview link to go back to the main page.

Event Contact

Contact

Buyer name

Name:

Email ID:

buyer@tn.gov

Phone:

555-12345

Save Event Changes

[< Return to Event Overview](#)

Configuring Line Items

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

The **Configure Line Items** section is used to edit Event Lines that have been copied in from the Requisition. It can also be used to manually create new Event Lines.

1. Click the Line Items link. [*Line Items](#) This will take you to the **Line Items** screen, shown below. **The Line Items screen will display the lines copied from the Requisition.** Any necessary

changes to existing lines can be made by clicking in the field (such as the Qty) and typing in the correct value.

Line Items

Business Unit: 32101 **Event ID:** 0000000242 **Round:** 1 **Version:** 1 **Event Format:** Buy **Event Type:** RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:

Line Items								
Customize Find View All		First 1-2 of 2						
Basic Definition		Advanced Definition						
Line	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount	Weighting
1	<input type="text" value="1000005112"/>	BOATS, PEDAL	120-21	<input type="text" value="EA"/>	1000.000	1450.0000	\$1450000.00	0.00000
2	<input type="text" value="1000005112"/>	BOATS, PEDAL	120-21	<input type="text" value="EA"/>	1.0000	1708.5400	\$1708.54	0.00000
Event Total: 1451708.5400 USD				Line Weighting Total: 0 % Remaining Weight: 100 %				

- To delete a line, click the blue minus button on that line ().
- To add a Line to the Event without copying it in, use the blue Plus button () to add a new row. This adds a row directly below the row where the Plus button was selected. If the blue Plus button is not visible, use the scrollbar to scroll to the right. An example blank row is shown below.

Line	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount	Weighting
3	<input type="text" value="1000011656"/>	FLAME RESISTANT PANTS, DEPT OF FORESTRY	999-99	<input type="text" value="EA"/>	20.0000	82.0000	\$1640.00	0.00000
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		0.00000

- The blank line will need to have information filled in. The required fields are Description, Unit of Measure (UOM) and Quantity (Qty). The Start Price and Item ID can also be filled in if available.
- To find if an Item ID exists for the requested item, use the Lookup tool () located by the Item ID field. This allows searching for item IDs that are already in the system. Clicking the Lookup button will pull up a menu to search by Item IDs, as shown below. Items currently on Agency or Statewide contracts will have Item IDs in the system.

Search by: begins with

[Advanced Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to red

[View All](#)

First 1-100 of 300 [Last](#)

Item ID	Description	Category	Category ID	Item Group	Family
1000000001	GROUNDS MTNC, DAYTIME, CMRA DE	999-99	08518	(blank)	(blank)
1000000002	SHIRT, GUARD, SS, GREY, FEM, S	200-85	01246	250	276

Line Bid Factors

- To add Bid Factors to a Line, go to the line, click the Advanced Definition tab, and then the Bid Factor link ([Bid Factors](#)) located to the right of the Details link. If it is not visible, use the scrollbar to scroll to the right. To view or add Bid Factors you must first have entered a Quantity, Unit of Measure and Start Price for the line, on the Basic Definition tab.

Copy From: Go

Line Items Customize | Find | View All | First 1 of 1 Last

[Basic Definition](#) [Advanced Definition](#)

Line	Item ID	Description	Item SetID	Details	Bid Factors	Constraints
1	<input type="text"/>	sprinkler system	SHARE	Details	Bid Factors	No

Event Total: 29500.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

- After clicking the Bid Factors link, you will be taken to the **Line Bid Factors** screen. **All line-specific Bid Factors must be entered here.**

Line Bid Factors

Line: 1 Bid Factor Weighting Total: 100.00000

Item ID: Remaining Bid Factor Weight: 0.00000

Description: sprinkler system at residential structure

Bid Factors

Seq Nbr:	1	Bid Factor:	PR	Type:	Monetary	Weighting:	100.00000	<input type="button" value="+"/>	<input type="button" value="-"/>
Question:	<input type="text" value="What is the unit price of this item?"/>			<input checked="" type="checkbox"/> Display Bid Factor <input checked="" type="checkbox"/> Bid Factor Response Required <input type="checkbox"/> Ideal Response Required <input type="checkbox"/> Include on Contract					
Best:	0.000000		Worst:	29500.000000					
<input type="button" value="Price Components"/>									
<input type="button" value="Cost Contribution"/>									

- To enter a Line Bid Factor, press the Plus button at the far right (). This will add a new Bid Factor immediately after the Bid Factor on which you pressed the Plus Button. The Price Bid Factor will default on every line. Pressing the Plus button on the Bid Factor shown below would create a new Bid Factor after the Price Bid Factor.

Create an Event

Line Bid Factors

Line: 1 Bid Factor Weighting Total: 100.00000
 Item ID: Remaining Bid Factor Weight: 0.00000
 Description:

Bid Factors

Seq Nbr: 1 Bid Factor: PR Type: Monetary Weighting: 100.00000
 Question: What is your price unit price?
☒ Display Bid Factor
☒ Bid Factor Response Required
☐ Ideal Response Required
☐ Include on Contract
 Best: 0.000000 Worst: 9999.000000

4. A new Bid Factor will have no data entered. To choose from the list of existing Bid Factors, click the Lookup Icon (🔍) next to the Bid Factor field.

Seq Nbr: 2 *Bid Factor: 🔍 *Type: Weighting: 0.00000
 Question:
☒ Display Bid Factor
☒ Bid Factor Response Required
☐ Ideal Response Required
☐ Include on Contract
 Best: 0.000000 Worst: 0.000000 UOM: 🔍
☐ Select for deletion

5. This brings up the list of Bid Factors. The search fields work the same as on any other page. Scroll down past the Search fields to see the list of currently-available Bid Factors.

Search Results

View All

First 1-25 of 25 Last

Bid Factor Code	Bid Factor Type	Description
BID_OFFER_EXPIRE	Numeric	Bid Offer Expiration
DGS_ATM_TERM	Text	Service Organization, T505
DGS_BIDDER_COOP	Yes/No	Local Government Offer T500
DGS_INVENTORY	Text	Inventory, T525
DGS_INV_TIME_IN_BU	Text	Inventory, Time in Business,
DGS_LICENSES	Text	Licenses (Listings), T560
DGS_QUAL_CONTROL	Text	Quality Control, T522
DGS_RETURN_GOODS_P	Text	Return Goods Policy, T550
DGS_SEC_STATE	Text	Register with Secretary of Sta
DGS_SRVC_EXPERIEN	Text	Janitorial Service Experience,

6. Click on the blue link for the Bid Factor needed. This will return you to the Bid Factor screen with the Bid Factor information populated into the field.

Seq Nbr:	2	*Bid Factor:	BRAND_MODEL	Type:	Text	Weighting:	0.00000	<input type="button" value="+"/>	<input type="button" value="-"/>
Question:	What is the Model you are Bidding? What is the Brand you are Bidding?				<input checked="" type="checkbox"/> Display Bid Factor <input checked="" type="checkbox"/> Bid Factor Response Required <input type="checkbox"/> Ideal Response Required <input type="checkbox"/> Include on Contract				
Ideal:	<input type="text"/>								

Note: If your event deals with a Proprietary brand and model this would be where you would utilize the “**Ideal Response Required**” functionality. Once checked you are required to install the brand and model into the ideal field. If the brand and model bid doesn’t match this entry, their bid will not be allowed to be submitted.

Ideal:

- Repeat this process for every Bid Factor on the line until all the necessary Bid Factors are entered. Then scroll down to the bottom of the page and press the OK button to return to the Line listing.

☐ Select for deletion

[View Bid Factor Clauses](#)

Add Bid Factors by Group Select Bid Factors	<input type="button" value="Delete Selected Rows"/>
---	---

Bid Factor Weighting Total: 100.00000

Remaining Bid Factor Weight: 0.00000

OK	Cancel	Refresh
----	--------	---------

- It will be necessary to repeat the above process for each line that requires entry of Line-specific Bid Factors.
- Once all Bid Factors are entered, click the Save Event Changes button at the bottom of the Line Items section.

After adding all Line Bid Factors:

Once all Line Bid Factors are added, you must review them to make sure that **NONE** of them have the "Ideal Response Required" box checked. ☐ **Ideal Response Required** *(Except in proprietary situations)*

IF THIS BOX IS CHECKED, BIDDERS MAY NOT BE ABLE TO COMPLETE THEIR BIDS!

Line Comments and Attachments

In addition to Attachments at the "Header" level, that cover the entire Event, it is also possible to attach files at the individual Line level. If you have line-specific documentation or specifications, this would be where to add them.

1. To add Attachments to a selected line, you must be in the Line Items section. Click the Advanced Definition tab, then the Comments (💬) icon, located on the far right. If it is not visible, use the scrollbar to scroll to the right. A picture is shown below.

Copy From:

Line Items							Customize Find View All	First 1 of 1 Last
Basic Definition		Advanced Definition						
Line	Item ID	Description	Item SetID	Details	Bid Factors	Constraints		
3		Pencil Holder	SHARE	Details	Bid Factors	No		

2. Clicking the Comments Icon brings up the Line Comments and Attachments screen. This would be where specifications or comments that apply **only** to the ***selected line*** are attached. Comments can either be typed into the text field or Attached by clicking the Add Attachment button. See the picture below for an example.

Modify an Event

Line Comments and Attachments

Event ID: 0000000244 Line Number: 3

Enter Comments		Find View All	First 1 of 1 Last
<p>Comments:</p> <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>			
<p><input type="checkbox"/> Send To Bidder <input type="checkbox"/> Include On Award</p>			
<p><input type="button" value="Add Attachment"/></p>			

3. Once all Lines have either been copied over or manually entered and are confirmed correct, click the Return to Event Overview link.
4. The next step is to select a list of Bidders that will receive the Event Notification.

Inviting Bidders and Vendors:

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)

In Step 3: Select Bidders to Invite you will select which Bidders will be sent Event Invitations.

1. Click the Bidder Invitations link.

[* Bidder Invitations](#)

2. This will bring you to the **Invite Bidders** screen, as shown below.

Create an Event

Invite Bidders

Business Unit: 32101 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☐ Public Event

[Customize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

Select	Bidder ID	Bidder Type	Name	Dispatch Method
1 <input type="checkbox"/>				Email

[Search for Bidders](#) Save Bidders as Group Search UDDI Registry

3. To make your event available to the general public on the e-Supplier portal click ☒ **Public Event**.
4. Click the Search for Bidders link. [Search for Bidders](#) This will bring up the Bidder Search screen.
 - If you already know the Bidders or Vendors you will be contacting, use the Lookup Icon (🔍) located by the ID Field or Name Field to pull up a list of Vendors by either ID or Name. This pulls up a list of names.

Bidder Search

Search Criteria

Bidder Type:

Name: 🔍 State: 🔍 Type:

ID: 🔍 City: SIC Type: 🔍



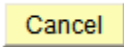
Contact: 🔍 Country: 🔍 SIC Code: 🔍

Group ID: 🔍 Postal: Item ID: 🔍

Group Name: 🔍

[Recommend Bidders](#) Maximum Rows retrieved: [Search](#)

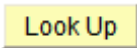
How to add a vendor/bidder by using their Vendor/bidder #:

1. From the Bidder Invitations screen click [Search for Bidders](#)
2. Choose in “bidder type” Vendor or Bidder. You can leave it blank to pull both Bidders and Vendors.
3. Click on the  in the ID field.
4. Click on Advanced Lookup.   [Advanced Lookup](#)
5. Change the Vendor ID search criteria to “contains” and type in the vendor number.

Look Up ID



SetID: SHARE

i. Vendor ID:

6. Click  and your vendor should appear.

Search Results

View All

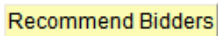
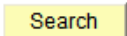
First  1-12 of 12  Last

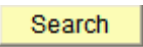
Vendor ID	Short Vendor Name	Name 1	Name 2	Our Customer Number	Old Vendor ID
0000010660	M AND C FO-001	M And C Forest Seeds Llc	(blank)	(blank)	V203893996

7. Click on the vendor and they will be populated into the ID field.

Bidder Search

Search Criteria			
Bidder Type:	<input type="text" value="Vendor"/>		
Name:	<input type="text"/>	State:	<input type="text"/>
ID:	<input type="text" value="0000010660"/>	City:	<input type="text"/>
Contact:	<input type="text"/>	Country:	<input type="text"/>
Group ID:	<input type="text"/>	Postal:	<input type="text"/>
Group Name:	<input type="text"/>	Type:	<input type="text"/>
		SIC Type:	<input type="text"/>
		SIC Code:	<input type="text"/>
		Item ID:	<input type="text"/>

 Maximum Rows retrieved: 

8. Click  and your vendor should appear again at the bottom of the screen.

Search Results			
		Customize Find View All	First 1 of 1 Last
Bidder ID	Location	Name	Invite
1 0000010660	MAIN	M And C Forest Seeds Llc	

OK Cancel Refresh

9. Check inside the Invite box and click .

- Your vendor will now be added to the bottom of your bid list.

Look Up Name

Search by: Name 1 begins with

Look Up Cancel [Advanced Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and see

[View All](#)

First 1-100 of 300 [Last](#)

Name 1	Short Vendor Name	Vendor ID
Advanced Electronics Inc	ADVANCED E-003	0000077490
Advanced Electronics Inc	ADVANCED E-010	0000351979

10. If you do not know the Bidder's ID, you will need to look up Bidders from the listing based on NIGP code. The Bidder Type drop-down menu at the upper left will be used in selecting bidders, along with the Recommend Bidder button. This pulls a list of all registered Bidders and Vendors that have the NIGP codes of the items included on the Event lines. Steps start below the picture.

Bidder Search

Search Criteria

Bidder Type:

Name: State: Type:

ID: City: SIC Type:

Contact: Country: SIC Code:

Group ID: Postal: Item ID:

Group Name:

Maximum Rows retrieved:

Enter search criteria and press search to retrieve bidders.

11. Select Vendor from the Bidder Type drop-down menu.

Bidder Search

Search Criteria

Bidder Type:

Name: State:

12. Press the Recommend Bidders button. This will bring up a list of all the Vendors that are registered in the system for the NIGP codes listed on the Event Lines.
13. Select Bidders from the Bidder Type drop-down menu, and then click the Recommend Bidders button a second time.

Bidder Search

Search Criteria

Bidder Type:








14. These two steps (5 and 6) compile a list of all Vendors and Bidders. Vendors are companies or entities that have received an award or payment from the state. Bidders are companies or entities that have registered but have not received an award.
15. If you need to narrow your search to only registered diversity vendors that are associated to the NIGP codes used in the event navigate to the "Type" field and select "Minority" from the list. **Additionally, be sure to consult the list of Certified Diversity Vendors at:** <http://www.tennessee.gov/businessopp/regdivcomp.html>

16. This field can also be used to search for bidders who are registered for a specific regional area. To do so, go to the Type field and select “East”, “East/Mid T”, “Middle”, “West” or “Statewide”. Then press the Recommend Bidders button again.

Type: 

17. Select the desired Bidders and Vendors from the compiled list by checking the Invite box next to the name.

[Select All](#) [Deselect All](#)

Search Results					Customize Find View All 	First  1-50 of 50  Last
Bidder ID	Bidder Type	Location	Name	Invite		
1 0000000215	Vendor	MAIN 	 Advanced Prof Generator	<input type="checkbox"/>		
2 0000000216	Vendor	MAIN 	 Szy Holdings Llc	<input type="checkbox"/>		

18. After all desired Vendors and Bidders are selected, click the OK Button. This will pull the selected Bidders and Vendors into the **Invite Bidders** screen, as shown below.

Invite Bidders

Business Unit: 32101 Event ID: 0000000242 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☒ Public Event

					Customize Find View All 	First  1-4 of 4  Last
Select	Bidder ID	Bidder Type	Name	Dispatch Method		
1 <input type="checkbox"/>	0000000496	Vendor	Brunswick Corp	Email 		
2 <input type="checkbox"/>	0000000521	Vendor	Safety Systems Corp	Email 		
3 <input type="checkbox"/>	0000000551	Vendor	Dmm Industries Inc	Email 		
4 <input type="checkbox"/>	PUBLIC_AUC	Public	This is a Public Event	Email		



[Search for Bidders](#)

[Save Bidders as Group](#)

[Search UDDI Registry](#)

[Save Event Changes](#)






Utilizing Public Auction to add email addresses to bid list

19 <input type="checkbox"/>	PUBLIC_AUC	Public	This is a Public Event	Email		
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By clicking on the contact details tab  under Public_Auc you can manually add email addresses to an event's bid list.

Public Event Contacts


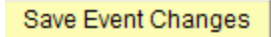
Setid: SHARE Bidder ID: PUBLIC_AUC

			Customize Find View All 	First  1 of 1  Last
Contact	Contact Name	Email ID		
1	<input type="text"/>	<input type="text"/>		

OK

Cancel

Refresh

- Click the  button to add contacts.
- Click OK and then .

After all vendors and bidders are selected, click the Return to Event Overview link.

[< Return to Event Overview](#)

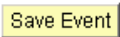

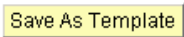
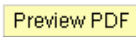
- ❖ The Preview Date and Time, Start Date and Time and the End Date and Time need to be set up now.
 - The Preview Date and Time sets the Event up so it can be viewed but not Bid on, for the time between the Preview Date and Time and the Start Date and Time. In the picture below, there is a week between the Preview Date and the Start Date, and two weeks between the Start and End Dates. **Generally, make the Preview Date and Start Date the same.**

Preview Date:	<input type="text" value="11/30/2010 9:00AM CST"/>
*Start Date:	<input type="text" value="11/30/2010 9:00AM CST"/>
*End Date:	<input type="text" value="12/13/2010 1:00PM CST"/>

Posting the Event

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

			
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- Review the event one final time for correctness, paying special attention to the Event Lines and the Bidder Invitations. When the final review is complete, press the Post button to route the event for approvals.

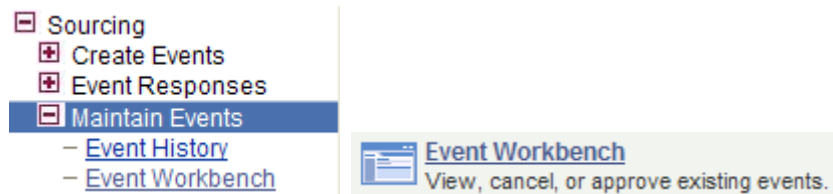
Altering and Changing Events

Once the event is posted creating a new event version will not allow you to change bid factors or add/subtract lines. It *will allow* for the dates to be changed and allows for adding attachments.

- When you create a new version from a posted event on the portal, the event will remain on the portal until the "new" version is posted. Therefore if a buyer feels that an Event should be removed from the Portal, the only avenue is to cancel the event **or change the end date on the event to the current date and time. This action will “complete” the event and remove it from the portal.**

Creating New Versions and Canceling Events

1. Go to the Event Workbench, under **Maintain Events**.



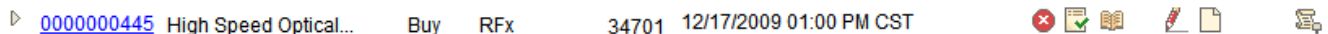
2. Type your Event ID at the top and click the Search button on the right-hand side.

Event Workbench

▼ Search Criteria

Event ID: <input type="text"/>	From Start Date: <input type="text"/>	To Start Date: <input type="text"/>	Sort With: <input type="text"/>
Created By: <input type="text"/>	From End Date: <input type="text"/>	To End Date: <input type="text"/>	Sort Order: <input type="text"/>
Event Format: <input type="text"/>	Category: <input type="text"/>	<input type="checkbox"/> Only show Events I created	
Event Type: <input type="text"/>	Item ID: <input type="text"/>	<input type="checkbox"/> Use my search defaults	
Event Status: <input type="text"/>	Item Description: <input type="text"/>	<input type="button" value="Search"/> <input type="button" value="Reset"/>	
Associated With Plan <input type="text"/>	Plan Name <input type="text"/>	Default Search Preferences	

3. After your Event is pulled up, scroll to the right and look at the Icons on the right-hand side.




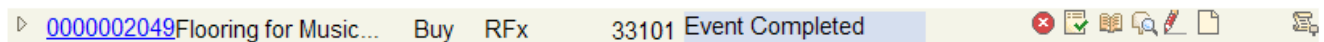
- **Creating a New Version:** To create a New Version of the Event, click the **Create New Version** icon .
- Creating a New version of the Event:
 - Will allow you to change Attachments
 - Will allow you to change Dates
 - Will allow you to change the Event Description
 - **Does** send a new notification to all the Bidders that a new Version has been created
 - Will **not** allow you to change Bid Factors
 - Will **not** allow you to change the Event Name
 - Will **not** immediately pull the Event from the Portal (website)
- **Canceling an Event:** To Cancel an Event, click the **Cancel Event** Icon ().
- Canceling an Event:
 - Completely disallows any and all changes, including the addition of Notes or Comments.
 - You should Copy your Event to a new Event before Canceling.


- **DO NOT** cancel an Event until you are absolutely sure you will not need it again.
- **DO NOT** cancel an Event if you know that Edison staff is working on your event to correct some problem.

Evaluating and Awarding Sourcing Events to selected Bidders

Events end when their End Date and Time are passed. Once the Event has ended, the bids are evaluated to determine the lowest responsive and responsible bidder.

Analyzing Bids: Analyze Events is available from the workbench. Click on  to pull up the Analyze Events screen.



1. Clicking  will take you to the main Analyze Events page, shown below. The analyze Events page starts out on the Analyze Total tab, which allows you to view up to three Bids on one screen. At the start, only the first two bids will be visible. By scrolling to the right using the scrollbar at the bottom of the screen, you can see more of the Bids. The picture below shows three Bids.

Analyze Events

[Analyze Total](#)
[Analyze Line](#)
[Review Constraints](#)
[Review Award Recommendation](#)
[Award Summary](#)
[Award Details](#)

Business Unit: 32101 Event ID: 0000000298 Round: 1 Version: 1 Event Name: Request for Bid, Widgets

Event Format: Buy Event Type: RFx Currency: USD End Date: 12/09/2008 10:25AM CST Status: Pending Award Go To:

▼ Bid Analysis and Display Options

Header Weighting: Sort Bids By: Total Event Score Sort Order: Descending

Display Options: ☐ Display Delta Responses ☐ Display Disqualified Bids ☒ Display Withdrawn Bidders



View Bid Actions: ☒ All Bid Actions ☐ Award ☐ Counter ☐ Disallow ☐ Reject ☐ <No Action>

Analysis			
Bidder Name	Wintham Professionals Inc	The Equitable	Delta Management Assoc
Event Version:	1	1	1
Bid Number:	1	1	1
Total Bid Amount:	2970.0000	3060.0000	3600.0000
Total Bid Cost	2970.00	3060.00	3600.00
Total Event Score:	100.0000	85.7000	0.0000
Total Header Cost	0.00	0.00	0.00
Total Header Score:	0.0000	0.0000	0.0000

2. The Analyze Total page lists information about the bid as a whole.

Bid Analysis: Reviewing a Bid and determining a Bidder consists of several steps, including analysis of the **Total Bid Amount**, any **Header Comments**, any **Line Comments** and any attached documents in the Bids that elaborate on any comments.

- **Total Bid Amount:** You can view the total price Bid by a vendor by looking at the **Analysis** section on the **Analyze Total** page. The **Total Bid Amount** row shows the combined price the Vendor has bid on all the lines.


- **Header Comments:** To view comments from a bidder on the Analyze Total page, scroll down to the **Analysis** section, which lists the Bidders and the total price they are bidding. Click on the Header Comments icon () in the column for each Bidder.
- Clicking on the Header Comments Icon  takes you to the Response Header Comments/Attachments section, where you can view any comments posted by the Vendor with their Bid.

Response Header Comments/Attachments



Business Unit: 32101 Event ID: 0000000298

Comments

Comments:

- A PDF version of the Bid with comments can be found in the Attached File section at the bottom of the page, viewable by clicking on the View Attached File () icon.

Attachments		Customize Find 	First  1 of 1  Last
Attached File	Attachment Description		
Request_for_Bid_Widgets.pdf	Bid Details 		

- After reviewing the Comments and any attached files for the first Bidder, repeat the process for all other Bidders. To do so, press the Return () button at the bottom of the **Response Header Comments/Attachments** page to return to the Analyze Total page, then select the Header Comments icon () for the next vendor.
- Once the Comments and attached files for all Bidders are reviewed, return to the main Analyze Total page again. Scroll down to the Factors section and review the answers given. To view all answers, you may need to use the scrollbar at the bottom of the page to scroll to the right. The picture below shows one Bid Factor for two of the three Bidders.

▼ Factors			
	Weighting	UOM	Ideal
Please provide the brand and model and manufacturer item number for this line item.	0.00000	 Brand Qwerty, Mod	Brand XYZ, Model A

- When all of the Header Comments and Header Bid Factors have been reviewed, move on to reviewing the Line Comments and Line Bid Factors.

- **Line Comments:** To view Line Comments for specific lines, first click the **Analyze Line** link at the top of the main **Analyze Events** page. The picture below shows what the main Analyze Events page will look like with the Analyze Line link clicked.

Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) [Review Award Recommendation](#) [Award Summary](#) [Award Details](#)

Business Unit: 32101 Event ID: 0000000298 Round: 1 Version: 1 Event Name: Request for Bid, Widgets

Event Format: Buy Event Type: RFX Currency: USD End Date: 12/09/2008 10:25AM CST Status: Pend Award Go To:

Select Line:

Line Number: 1 Requested Quantity: 6.0000 UOM: EA Start Price:

Item ID: Item Description: [Widget](#) Weighting:

▼ Bid Analysis and Display Options

Analyze Qty: Sort Bids By: Sort Order:

Display Options: ☐ Display Delta Responses ☐ Display Disqualified Bids ☒ Disq

View Bid Actions: ☒ All Bid Actions ☐ Award ☐ Counter ☐ Disallow ☐ Reject ☐ <No

Analysis

Bidder Name: [Windham Professionals Inc](#) [The Equitable](#)

- Use the Select Line drop-down box to select the line for review. All Bid Lines must be reviewed, but in the example Bid there is only one line.

Select Line:

Line Number:

- After selecting the appropriate Line for review, you must view the Line Comments for each Bidder. This is done the same way as viewing Header Comments, in that you must click the (💬) icon, which on the Analyze Line section means **Line Comments**. Clicking that link will take you to the page below, where any comments submitted for the line by the Bidder will be shown.

Response Line Comments/Attachments

Business Unit: 32101 Event ID: 0000000298 Line: 1

Comments

Comments:

Award Summary Page

There have been smoe instances where an Event Line becomes unavailable to award after the drop-down box is changed from "O" to "C".

Due to this possibility, **DO NOT change the "Line Status" drop-down box from O to C.**

Posting Bid Tabulations to the e-Supplier Portal

- Generating the Analyze Export will post the event's tabulation to the e-Supplier Portal so the participants in your event can easily see what their competitors bid. This is also the easiest tool to utilize in looking at your bid results. After changing the format, (described below), the export will be an Excel spreadsheet. This spreadsheet allows for great manipulation in terms of evaluating bids posted.

- Go to the **Analyze Events** page in Edison, for the Event you want to look at.

Analyze Events

[Analyze Total](#)
[Analyze Line](#)
[Review Constraints](#)
[Review Award Recommendation](#)
[Award Summary](#)
[Award Details](#)

Business Unit:	Event ID:	Round:	Version:	Event Name:
32101	0000000218	1	3	A5042, Envelope special double window
Event Format:	Event Type:	Currency:	End Date:	Status:
Buy	RFx	USD	08/20/2009 1:00PM CDT	Awarded
				Go To:
				...

- Click on the **Go To:** drop-down box at the upper right of the **Analyze Total** tab.

Go To:

...

- Click on the **Analyze Export** option.

Go To:

...

...
Analyze Export

- This takes you to the **Bid Analysis Export** page.

Bid Analysis Export

Business Unit:	Event ID:	Round:	Version:	Event Name:
32101	0000000218	1	3	A5042, Envelope special double window
Event Format:	Event Type:	Currency:	Finish:	Status:
Buy	RFx	USD	08/20/09 1:00PM CDT	Awarded

Analysis Export File Recipients			First	1 of 1	Last
*Name	*Email Address	Notify			
1 Stan Mikotowicz	stanley.mikotowicz@tn.gov	<input checked="" type="checkbox"/>			

Filter Bids

Select the bids you want to include in your Analysis Export file.

☒ Award
 ☒ Counter
 ☒ Disallow
 ☒ Reject
 ☒ <No Action>

☒ Display Disqualified Bids
 ☒ Display Withdrawn Bids

Filter Bid Responses

☐ Display Delta Responses

[Return to Analyze Event](#)

- In the **Analysis Export File Recipients** section, you can add other people to receive a copy of the export.

Analysis Export File Recipients			First	1 of 1	Last
	*Name	*Email Address	Notify		
1	Stan Mikotowicz	stanley.mikotowicz@tn.gov	<input checked="" type="checkbox"/>	+	-

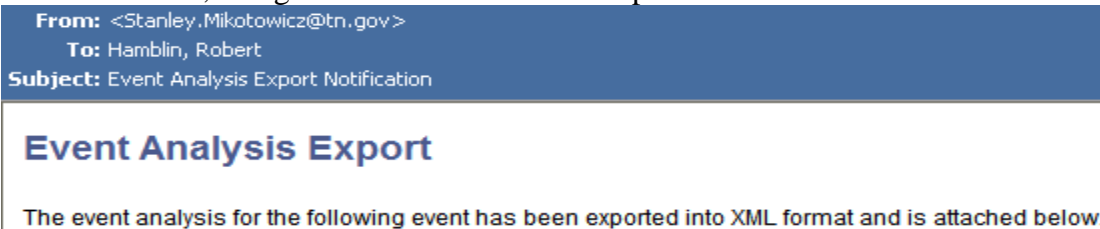
Press the Plus (+) button to add another blank recipient line, then fill in their name and e-mail address.

2			<input checked="" type="checkbox"/>	+	-
2	Robert Hamblin	robert.hamblin@tn.gov	<input checked="" type="checkbox"/>	+	-

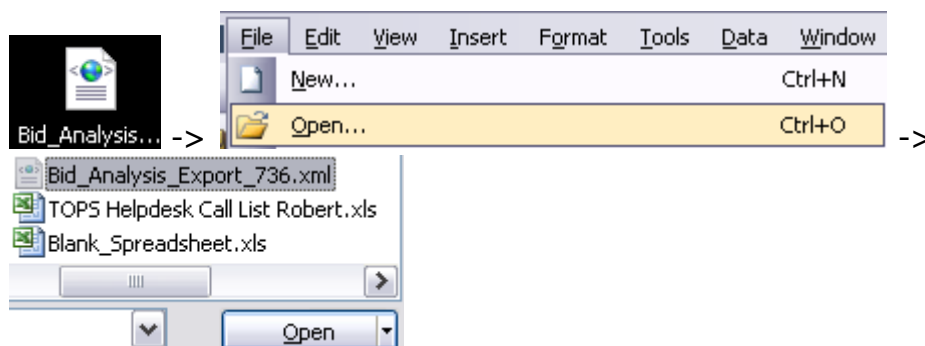
6. After all the Recipients you want have been added, click on the **Create Analysis Export** button at the bottom of the page.

Create Analysis Export

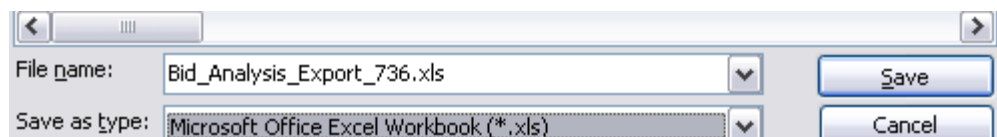
7. A few minutes later, all the recipients you listed will receive an e-mail that has the .xml Export file attached, along with instructions how to open it.



8. Save the file to your desktop or folder. Open Excel, then go to File-> Open and select the XML file from wherever you saved it.



9. The file will open. Then immediately go to **File**, then **Save As** and save a copy of it in .xls (Excel) format.



10. Close the XML file and open the Excel file. It should look like the picture below.

Microsoft Excel - Bid_Analysis_Export_736.xls

File Edit View Insert Format Tools Data Window Help

100%

A1

Event Analysis

State of Tennessee Sourcing Event

Event ID	Format	Type	Round	Version
32101-0000000736	Buy	RFx	1	1
Event Name				
EMS Automation System Maintenance - Jackson, TN				
Start Time		Finish Time		
02/01/2010 03:00 PM CDT		02/03/2010 01:00 PM CDT		

Report Date:

Event Currency:

Bids Allowed in Other Currency:

Factor General Score into Line Score:

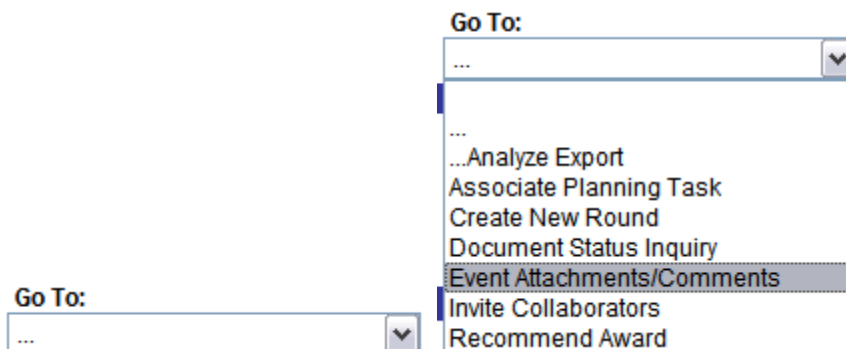
Included Bids:

Highlight Delta Response:

- The tabulation will now be available for viewing on the e-Supplier Portal home page under “Bid Evaluations”. They will have to perform the instructions about converting the xml file to a spreadsheet.

Awarding to Vendor

- After determining the winning Bidder, return to the main Analyze Events page. Click the Go-To Drop-down box at the top right of the page, and select the Event Attachments and Comments option.



- This takes you to the **Event Attachments and Comments** page, where you will enter your notes and justification for awarding to the selected Vendor. Type your notes describing the justification for awarding to the selected vendor in the Comments text box. For internal comments such as notes, do not check the Send to Bidder or Include on Award boxes. Then press the OK button at the bottom of the screen to return to the main menu.

Analyze Events

Event Header Comments and Attachments

Event ID: 0000000527

Enter Comments

First 1 of 1 Last

Comments:

☐ Send To Bidder ☐ Include On Award [Standard Comments](#)

Add Attachment

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
1 nbtest3.xml	Event Bid Package	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 nbtest3.pdf	Event Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

From here, the award method differs depending on whether you are awarding to a Purchase Order or to a Contract.

Awarding all lines to one vendor

To Award an event, go back to the main Analyze Total page, shown below.

Analyze Events

Analyze Total [Analyze Line](#) [Review Constraints](#) [Review Award Recommendation](#) [Award Summary](#) [Award Details](#)

Business Unit: 32101 Event ID: 0000000298 Round: 1 Version: 1 Event Name: Request for Bid, Widgets

Event Format: Buy Event Type: RFX Currency: USD End Date: 12/09/2008 10:25AM CST Status: Pend Award Go To:

Bid Analysis and Display Options

Header Weighting: Sort Bids By: Total Event Score Sort Order: Descending

Display Options: View Factor Responses ☐ Display Delta Responses ☐ Display Disqualified Bids ☒ Display Withdrawn Bidders

View Bid Actions: ☒ All Bid Actions ☐ Award ☐ Counter ☐ Disallow ☐ Reject ☐ <No Action>

Analysis

Bidder Name	Windham Professionals Inc	The Equitable	Delta Management Assoc
Event Version:	1	1	1
Bid Number:	1	1	1
Total Bid Amount:	2970.0000	3060.0000	3600.0000
Total Bid Cost:	2970.00	3060.00	3600.00
Total Event Score:	100.0000	85.7000	0.0000
Total Header Cost:	0.00	0.00	0.00
Total Header Score:	0.0000	0.0000	0.0000
Bid Action	NA	NA	NA

- Select Award from the Bid Action drop-down menu, located under each bidder's header.
- Enter 100 in the Award by Percent field, under the column of the winning Bidder.

Bid Action: NA NA NA

Reject Reason Code:

Award by Percent:

NA Award 100

Line Item Awards

To award to different Vendors by Line Item, go to the **Analyze Line** page, shown below. By default, it will start on the first line. Use the Award drop-down box to select the vendor to award the line to, similar to the above award process for all lines to one Vendor. . Use the "Select Line" dropdown box to select a different line of the Contract. Repeat for each line as necessary.

- Eliminate all distractions when awarding to multiple vendors with multiple lines. It is very easy to get confused and award to the wrong vendor or wrong bid number.

Select Line:

Line Number: 1 - 1000009689 - TORTILLA SHELLS, FLOUR, 6 INCH 2

Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) [Review Award Recommendation](#) [Award Summary](#) [Award Details](#)

Business Unit: 32101 Event ID: 0000000544 Round: 1 Version: 1 Event Name: Invitation to Bid for Tiller, Rotary

Event Format: Buy Event Type: RFx Currency: USD End Date: 12/30/2008 10:38AM CST Status: Pend Award Go To:

Select Line:

Line Number: 1 Requested Quantity: 7000.0000 UOM: EA Start Price: 16.18000

Item ID: 1000009689 Item Description: [TORTILLA SHELLS, FLOUR, 6 INCH 200 CS.](#) Weighting: 100.00000

▼ Bid Analysis and Display Options

Analyze Qty: 7000.0000 Sort Bids By: Sort Order: Descending

Display Options: ☐ Display Delta Responses ☐ Display Disqualified Bids ☒ Display Withdrawn Bidders

View Bid Actions: ☒ All Bid Actions ☐ Award ☐ Counter ☐ Disallow ☐ Reject ☐ <No Action>

Analysis

Bidder Name	Hardins Sysco Food Services	Robert B Shaw Jr	Gordon Foodservice
Event Version:	1	1	1
Bid Number:	1	1	1
Bid Quantity:	7000.0000	7000.0000	7000.0000
Minimum Bid Quantity	0.0000	0.0000	0.0000

- For each line enter 100 in the Award by Percent field, under the column of the winning Bidder. This means you're awarding 100% of that line to the awarded vendor.

The image shows a dropdown menu for award actions with options: NA, Award, Counter, Disallow, NA, and Reject. The 'Award' option is selected. To the right, there is an input field for the award percentage, which has the value '100' entered.

- When awarding by line, to multiple vendors, it can get confusing as to who you've awarded to. One way to get an accurate glimpse of what lines you've award and who to is to go to the [Award Summary](#) section. This page will display each line and the awarded vendor/bidder.

Line Item ID	Description	Requested Qty	Event Price	Extended Amount	Award Quantity	Award Amount	Quantity Remaining	Line Status
1 1000129499	Emergency Generator Maintenance, Major Semi-Annual Inspection, Lowell Thomas State Office Bldg., 225 Dr. Martin Luther King Dr., Jackson.	3.0000	1150.000000	3450.0000	0.0000	0.0000	3.0000	C
<u>Select</u>	<u>Name</u>	<u>Awarded Qty</u>		<u>Total Line Amount</u>	<u>Extended Amount</u>			
<input type="checkbox"/>	Carter And Co	0.0000		415.000000	0.0000			
2 1000129500	Emergency Generator Maintenance, Minor Semi-Annual Inspection, Lowell Thomas State Office Bldg., 225 Dr. Martin Luther King Dr., Jackson.	3.0000	590.000000	1770.0000	0.0000	0.0000	3.0000	C
<u>Select</u>	<u>Name</u>	<u>Awarded Qty</u>		<u>Total Line Amount</u>	<u>Extended Amount</u>			
<input type="checkbox"/>	Carter And Co	0.0000		220.000000	0.0000			

Note: When you are on the Award Details page and attempting to Award to different Vendors for each line, the display may be somewhat confusing.

When you award by line the system displays every line bid on the award details page for every award. For any line that has \$0.00 the system is recognizing that another bidder received the award. Once you click the "post" button the purchase order or contract is created and only the awarded lines (with actual bid prices on the award details page) will be carried over.

This means that if a line is listed under a certain vendor with an award Price of \$0.00, it will not actually be awarded to that vendor, even though it is displayed.

Award Details

First 1 of 6

Bidder Name: Louisiana Forest Seed Co., Inc

Bidder Type: Vendor

Buyer: mattc0620001

Award Type: PO Contract

Award Currency: Event USD

Terms:

Contract ID 0000000000000000000018029

PO Business Unit: 32501

Award Number: 1

Total Award: 883.7000

Award Lines

Line	Item ID	Vndr/Item Rel	Seed, American Beautyberry (Callicarpa americana) Location: East Tennessee Nursery, P.O. Box 59, 906	UOM	Award Quantity	Awarded Price	Extended Price		
32	1000113024	<input checked="" type="checkbox"/>	Seed - Pine, Loblolly, 2nd Generation	LB	100.0000	26.0000	2600.0000		
2	1000112377	<input checked="" type="checkbox"/>	Seed, Hazelnut (Corylus americana) Location: East Tennessee Nursery, P.O. Box 59, 9063 Hwy. 411 Sout	EA	0.0000	0.0000	0.0000		

For example, in the above picture, Louisiana Forest Seed CO, Inc will not actually receive an award for line 2, Hazelnut Seed, even though the line is listed, because it is being awarded a quantity and price of 0.

Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) [Review Award Recommendation](#) [Award Summary](#) [Award Details](#)

Business Unit: 32101 Event ID: 0000000127 Round: 1 Version: 2 Event Name: Lawn maintenance for multiple bldgs- Jackson TN
 Event Format: Buy Event Type: RFx Currency: USD End Date: 06/30/2009 1:00PM CDT Status: Awarded Go To:

▼ Show Award Details to Bidders

☒ Display bids ☒ Display all bids ☒ Display bid scores ☒ Display bid's total bid price ☒ Display factors

Award Details

First 1 of 3 Last

Bidder Name: [Jowers Cleaning Services](#) Bidder Type: Vendor Buyer: mattc0620001
 Award Type: PO Contract Award Currency: Event USD Terms:

- Review the vendors you awarded to by clicking on the **Award Details** page. Navigate through each award by clicking [First](#) [1 of 3](#) [Last](#).

Awarding to Purchase Orders:

To be done after you've set all lines to "Award".

- Click the Award Details link at the top of the page. Select Award Type from the drop-down menu. To award to a PO, select Purchase Order from the drop-down.

▼ Show Award Details to Bidders

☒ Display bids ☒ Display all bids ☒ Display bid scores ☒ Display bid's total bid price ☒ Display factors

Award Details First 1 of 1 Last

Bidder Name: [Windham Professionals Inc](#) Bidder Type: Vendor Buyer:

Award Type: Purchase Order Award Currency: Event USD Terms:

PO Business Unit:

Award Number: 1 Total Award: 5001.0000

Award Type: Purchase Order

Award Number:

Award Lines

General Contract

PO Contract

Purchase Order

Single Release PO Contract

- Once an Award Type has been selected from the Award Type drop-down, type in the Business Unit the PO is for, if it did not default in. This field is shown below.

PO Business Unit: 32101

- You must now finish awarding the Event. To do so, hold down the **Ctrl** key (Ctrl) on your keyboard and click the Post Award button, located on the Award Details screen.

Analyze Events

Analyze Total		Analyze Line		Review Constraints		Review Award Recommendation		Award Summary		Award Details	
Business Unit:	Event ID:	Round:	Version:	Event Name:							
32101	0000000480	1	2	Widgets for Repairs at TN Tower							
Event Format:	Event Type:	Currency:	End Date:	Status:		Go To:					
Buy	RFx	USD	12/11/2008 1:05PM CST	Pend Award		...					
<input checked="" type="checkbox"/> Show Award Details to Bidders											
<input checked="" type="checkbox"/> Display bids <input checked="" type="checkbox"/> Display all bids <input checked="" type="checkbox"/> Display bid scores <input checked="" type="checkbox"/> Display bid's total bid price <input checked="" type="checkbox"/> Display factors											
Award Details											
Bidder Name: General Revenue Corporati Bidder Type: Vendor Buyer: <input type="text" value="TN_SVC01"/>											
Award Type: <input type="text" value="Purchase Order"/> Award Currency: <input type="text" value="Event"/> USD Terms: <input type="text"/>											
PO Business Unit: <input type="text"/>											
Award Number: 1 Total Award: 550.0000											
Award Lines											
Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price				
1		<input checked="" type="checkbox"/>	Widgets	EA	6.0000	499.0000	2994.0000				
2		<input checked="" type="checkbox"/>	Protective Cover	EA	6.0000	51.0000	306.0000				
<div>Post Award</div>											

4. You should be taken to the Purchase Order screen.

Creating Purchase Orders

Purchase Orders are created by after a Requisition has been processed.

You will be automatically taken to the Add/Update POs page after clicking the Post Award button, if the Award Type selected was "Purchase Order".

Express Purchase Order

Purchase Order

Unit: 32101

PO ID: 0000000186

Copy From:

PO Status: Open

Budget Status: Not Chk'd

☐ Hold From Further Processing

1. The PO Date, Vendor Name, Vendor ID, Buyer ID and the Lines should default in from the Event and the User Preferences. These can be changed from the **Vendor Details** link ([Vendor Details](#)) if they did not transfer over correctly. The picture below shows an example of what the screen will look like with these values defaulted in. The next few sections are for **review**, and *options may not need to be changed*.

Header									
*PO Date:	12/11/2008	Vendor Search	Sub Contractor	Doc Tol Status:	Not Chk'd				
Vendor	GENERAL RE-001	Vendor Details	Insur/Bond/Cert						
*Vendor ID:	0000000094	General Revenue Corporati			Receipt Status:	Not Recvd			
*Buyer:	TN_SVC01				*Dispatch Method:	Print	Dispatch		
PO Reference:				Amount Summary					
Header Details PO Activities Add ShipTo Comments				Merchandise:	3300.00				
PO Defaults Document Status				Freight/Tax/Misc.:	0.00		Calculate		
Edit Comments Requisitions				Total Amount:	3300.00 USD				
Add Items From				Select Lines To Display					
Purchasing Kit Catalog Item Search				Line:		To:		Retrieve	
Lines									
Line	Item	Description	PO Qty	*UOM	Category	Amount			
1		Widgets	6.0000	EA	120-96	25			
2		Protective Cover	6.0000	EA	910-78	3			

2. **Review Header Details:** If all of the information listed in step 1 is correct, go on to review the Header Details by clicking the [Header Details](#) link. This takes you to the **Header Details** screen shown below, where you can review Billing Information, Vendor Information and Tax-Exempt status, and accounting date for the PO. This also allows you to set if Acknowledgements of the Purchase Order are required.
3. **Review PO Defaults:** The things that can be changed on this screen are the **Schedules**, the Distribution and information. This is used to determine where the items on the lines will be shipped, if portions of the order need to go to different locations. The two Radio Buttons at the top, Default and Override, determine what will happen with the information entered on this screen.
 - Default: These become a new default only if there were no default values set up for that field. For example, entering a new Ship-To address when one already exists will do nothing if Default is selected.
 - Override: These override any existing information. For example, entering a new Ship-To address when one already exists will overwrite the old one, if Override is selected.

Purchase Order Defaults

Unit:	32101	PO ID:	0000000186	Vendor:	GENERAL RE-001
-------	-------	--------	------------	---------	----------------

Default Options

☐ **Default** If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ **Override** If you select this option, all default values entered on this page override the default values found in the default hierarchy.

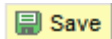
Line

Category: Unit of Measure:

Schedule

Ship To:	PMFMSHIP TO	PM-FM Ship to location	Ultimate Use Code:	<input type="text"/>
Due Date:	<input type="text"/>		Original Promise Date:	<input type="text"/>
Ship Via:	BEST WAY		Freight Terms Code:	DEST
Arbitration:	<input type="text"/>		Freight Charge Method:	<input type="text"/>
*Distribute by:	Quantity		One Time Address	

- After reviewing all the information on the PO, return to the main **Purchase Order** page and click the Save button, located at the bottom of the screen.



- You will now need to Budget Check the document and Dispatch it. To Budget Check, click the **Budget Check** () icon located at the top right of the page. It will show as Processing for a few seconds, then it will come back with **Budget Status: Valid**. This encumbers funds for the Purchase Order. An example is shown below. The PO must be approved after Budget Check before it can go any further.

Express Purchase Order

Purchase Order

Unit:	32101	PO Status:	Open		
PO ID:	0000000186	Budget Status:	Not Chkd		
Copy From:	<input type="text"/>	<input type="checkbox"/> Hold From Further Processing			

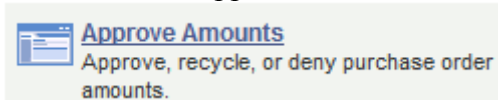
If budget status is error: This can occur when funds are lower on the requisition than the awarded purchase order the system allows the purchase order to build but when the buyer budget checks the PO they will see a Doc Tolerance error or a budget error.

The buyer must contact their fiscal officer or someone that has the approval rights to override a doc tolerance or budget error. After they complete that step the PO can be processed.

- The next step is to approve the PO. To do so, click the “Purchasing” link on the left-hand menu. Then click “Purchase Orders”.

- ☐ Purchasing
- ☒ Requisitions
- ☒ Procurement Contracts
- ☒ Purchase Orders

7. Click the “Approve Amounts” link under the Purchase Order section.



8. Use the Search screen that appears to find your Purchase Order by typing the PO number into the “PO Number” field and changing the drop-down box from Begins to Contains, as shown below. Then press Search.

Amount Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit:

PO Number:

SetID:

Contract ID:

Release Number:

Purchase Order Reference:

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

9. Click the link for the PO that appears.

Search Results

[View All](#)


First 1 of 1 Last

Business Unit	PO Number	SetID	Contract ID	Release Number	Purchase Order Reference
32101	0000000166	SHARE	(blank)	0	8658588

10. This will take you to the Approve Order Amounts screen, shown below. Make sure the drop-down box is set to “Approve”, then press the Save button. It defaults at Approve.

Purchase Order Amount Approval

Unit:	32101	PO ID:	0000000166	Vendor:	0000001427
-------	-------	--------	------------	---------	------------


*Approval Action:	Approve 	Approval Status:	Initial	View Printable PO
-------------------	---	------------------	---------	-----------------------------------


Comment


PO Amount

Buyer:	Sandra P Rees		
PO Reference:	8658588		
PO Date:	01/14/2009		
Merchandise Total Amount:	106.20 USD	Merchandise Total Base:	106.20 USD
PO Total Value:	106.20	PO Total Base:	106.20

▶ Lines


 Save

 Return to Search

 Notify

11. Return to the main Purchase Order screen.

12. After being Budget Checked and approved the Purchase Order is ready for Dispatch. Check the **Dispatch** drop-down menu on the main page to make sure the preferred Dispatch Method is selected. **Change the method to “Print”.**

*Dispatch Method:	Print 
-------------------	---

Amount Summary

Merchandise:

Freight/Tax/Misc.:

EDX

Email

Fax

Phone


Print

13. Once all the information is reviewed and the PO has been Budget Checked, the **Dispatch** button will be highlighted. Click the Dispatch button ([Dispatch](#)) to finish the Purchase Order process and generate the print job in your Process Monitor.


Printing a authorized PO

You must have dispatched the Po.


1. Click on FSCM Process monitor.

-  FSCM Reporting Tools
 - [FSCM Query Viewer](#)
 - [FSCM Report Manager](#)
 - **[FSCM Process Monitor](#)**
 - [FSCM Schedule Query](#)

2. Confirm that your buyer id is entered into the User ID.

- Click refresh  and the jobs that have ran for you within the last __ days will pull up.
 - You may edit the number of day's field.
- To find your PO make sure all the filters are blank. Click on the blue hyper link labeled [PODISP](#). Check the run date to confirm it's the same PO.

View Process Request For




User ID: Type: Last: Days 

Server: Name: Instance: to

Run Status: Distribution Status: ☒ Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1420657		Application Engine	TN_FS_BP	mattc0620001	10/07/2009 11:16:50AM CDT	Success	Posted	Details
<input type="checkbox"/>	1412651		Application Engine	TN_FS_BP	mattc0620001	10/06/2009 2:28:58PM CDT	Success	Posted	Details
<input type="checkbox"/>	1364906		PSJob	PODISP	mattc0620001	09/30/2009 3:21:30PM CDT	Success	Posted	Details

3. Click on the second hyper link “TNPO005 Success”.

-  [1364906 - PODISP Success](#)
-  [1364907 - TNPO005 Success](#)
-  [1364908 - TN PO NOTIFY Success](#)

4. Bottom of the screen click on “View Log/Trace”.

Date/Time	Actions
Request Created On: 09/30/2009 3:21:30PM CDT	Parameters
Run Anytime After: 09/30/2009 3:21:30PM CDT	Message Log
Began Process At: 09/30/2009 3:21:53PM CDT	Batch Timings
Ended Process At: 09/30/2009 3:22:08PM CDT	View Log/Trace

5. Choose the middle hyper link with the .pdf.

File List		
Name	File Size (bytes)	Datetime Created
SQR TNPO005_1364907.log	1,723	09/30/2009 3:22:08.000000PM CDT
tnpo005_1364907.PDF	2,625	09/30/2009 3:22:08.000000PM CDT
tnpo005_1364907.out	124	09/30/2009 3:22:08.000000PM CDT

- Note: On the PO screen, if your dispatch method was set to
***Dispatch Method:** then the .pdf PO **will not** be present in the above screen and you will not be able to print the PO.

6. The PO will open.

Agriculture

Call for Shipping Information
United States

Vendor: 0000117909
Green Wave, Inc.
DBA: Auction Generated Address 1
4858 Hwy 106 N
Danielsville GA 30633

Purchase Order

Dispatch via Print

Purchase Order	Date	Revision	Page
32501-0000003399	09/28/2009		1
Payment Terms	Freight Terms	Ship Via	
Net 30	FOB DESTINATION	BEST	
Buyer	Phone	Currency	
Matthew C Ross	615/253-2316	USD	

Ship To: OZIER ROAD
PINSON TN 38366
United States

Bill To: Call for Shipping Information
United States

Tax Exempt? N		Tax Exempt ID:		Replenishment Option: Standard			
Line-Sch	Item/Description	Mfg ID	Quantity	UOM	PO Price	Extended Amt	Due Date
1- 1	Loblolly Pine Cone Harvest		2,000.00	BU	15.40	30,800.00	09/28/2009
Schedule Total						30,800.00	
Item Total						30,800.00	

Terms & Conditions

Certificate of Insurance

Specifications


Total PO Amount 30,800.00

Authorized Signature

Adding Brands & Models to a PO

Brands and models do not pull over from the event onto the printed Po. In order for them to print, the info must be entered into the Line Details section for each line.

- Note: *If the PO has already been dispatched* Dispatch *the brand and model field will not be available.*


- From the main page of the PO click  on the line you need to add the brand and model information.

- Click [Expand All](#) from the line details page and locate the item information. (See below)

Item Information	
Vendor's Catalog:	<input type="text"/>
Vendor Item ID:	<input type="text"/>
Manufacturer ID:	<input type="text"/>
Manufacturer's Item ID:	<input type="text"/>
UPN ID:	<input type="text"/>
Replenish Code:	Standard
	<input type="checkbox"/> Stockless Item <input type="checkbox"/> Device Tracking <input type="checkbox"/> Withholding
	Withholding Code: <input type="text"/>

- Enter in the Brand and Model into the **Vendor Item ID** field. There is a **20 characters limit** on what will display on the PO.

Vendor Item ID: - Vendor Part Number

- If more detailed information is required to print on the PO, access the line comment section by clicking  on the line and enter the additional information. These comments will display below the line.

Comments		Find View All	First	1 of 1	Last
Copy Standard Comments	Copy Item Specs	Comment Status:	Active	Inactivate	+
<div> <div>Deliver sailboat to Mike Utley Call 555-1234 upon delivery.</div> <div>    </div> </div>					

- Click and save at the main PO page.

- Once printed with the brand and model will display above the line description.

CC953402
SAUCE, BEEF MEAT, W/TVP, 9LB/BG

Tax Exempt? Y		Tax Exempt ID: 62-6001445		Replenishment Option: Standard		
Line-Sch	Item/Description	Mfg ID	Quantity UOM	PO Price	Extended Amt	Due Date
1- 1	CC953402 SAUCE, BEEF MEAT, W/TVP, 9LB/BG	TRICOR TN	10.00BG	8.83	88.30	11/08/2010
Schedule Total					88.30	
Item Total 1000071134					88.30	